



Korea



Japan



United States

100,000km²
490 people/km²
48m people

378,000km²
340 people/km²
128m people

3,794,000km²
31 people/km²
308m people
map: California

94.1%

51.7%

50.8%

Households with broadband access(OECD, 2007)

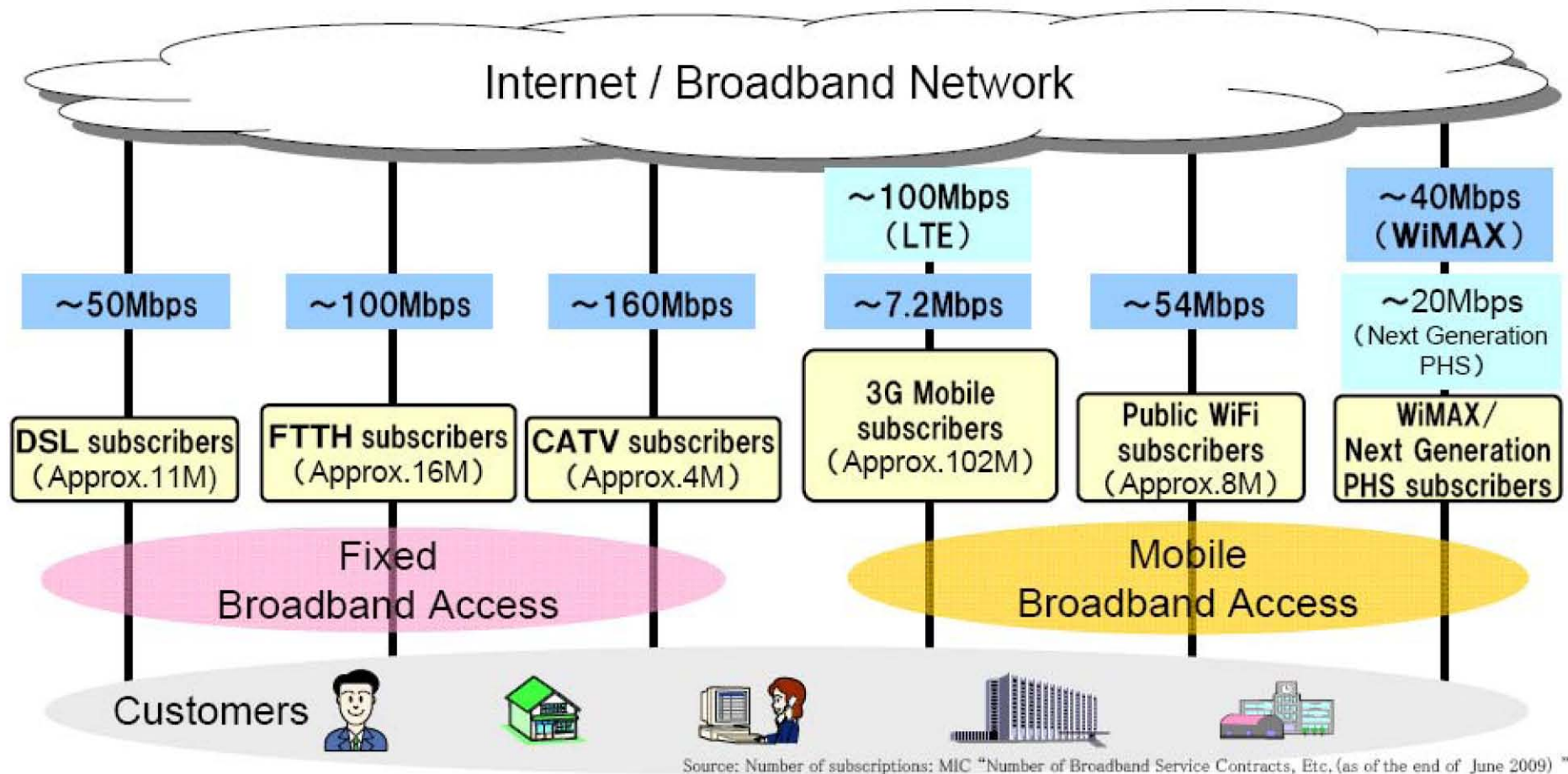
32.8

24.2

26.7

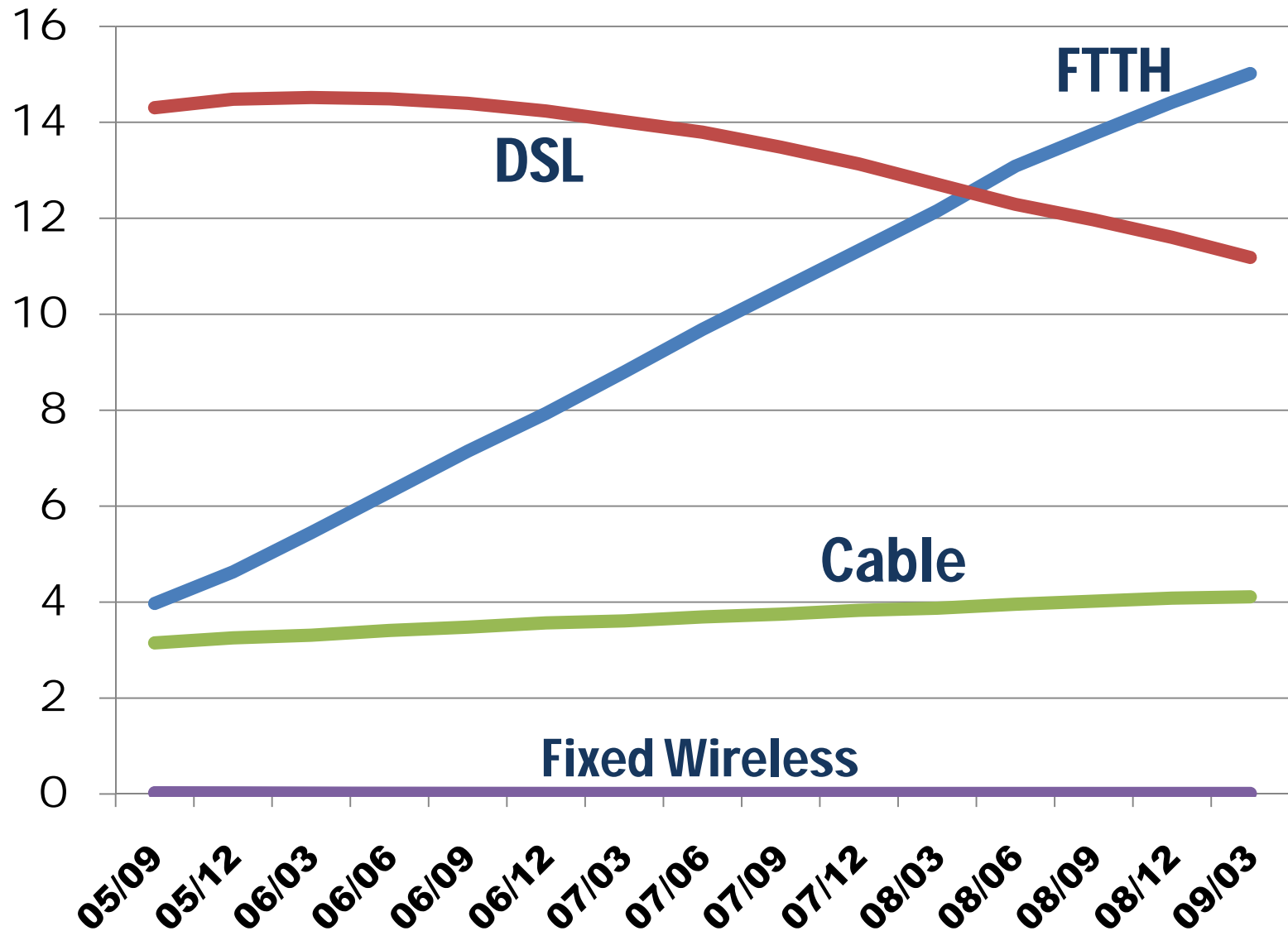
Broadband subscribers per 100 inhabitants (OECD, Jun 2009)

Faster and Diversified Broadband Access in Japan



Broadband Subscribers in Japan

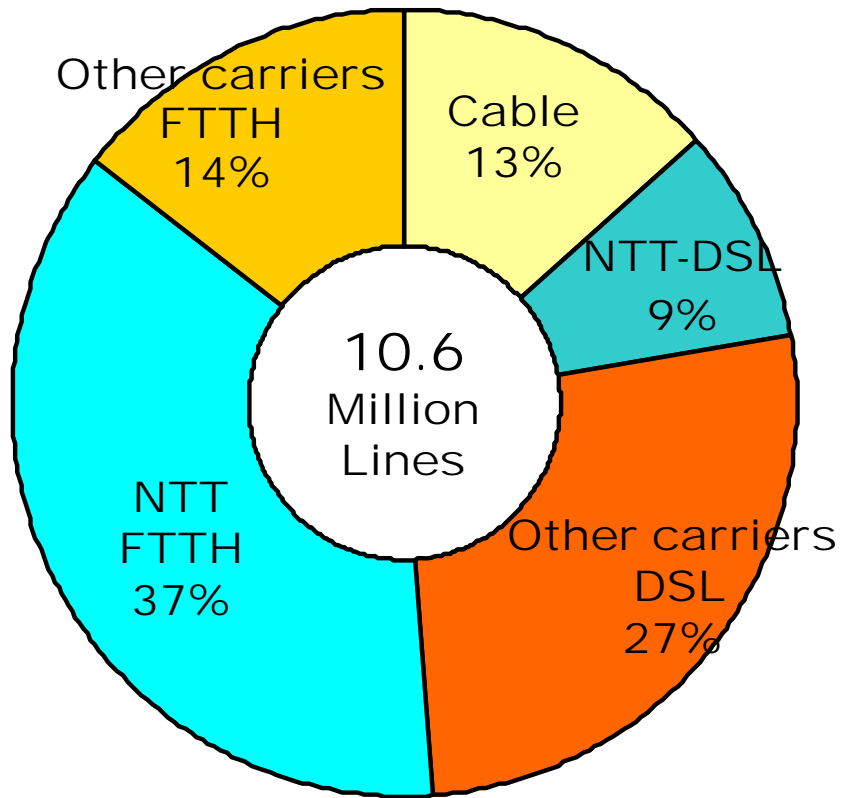
Millions of Subscribers



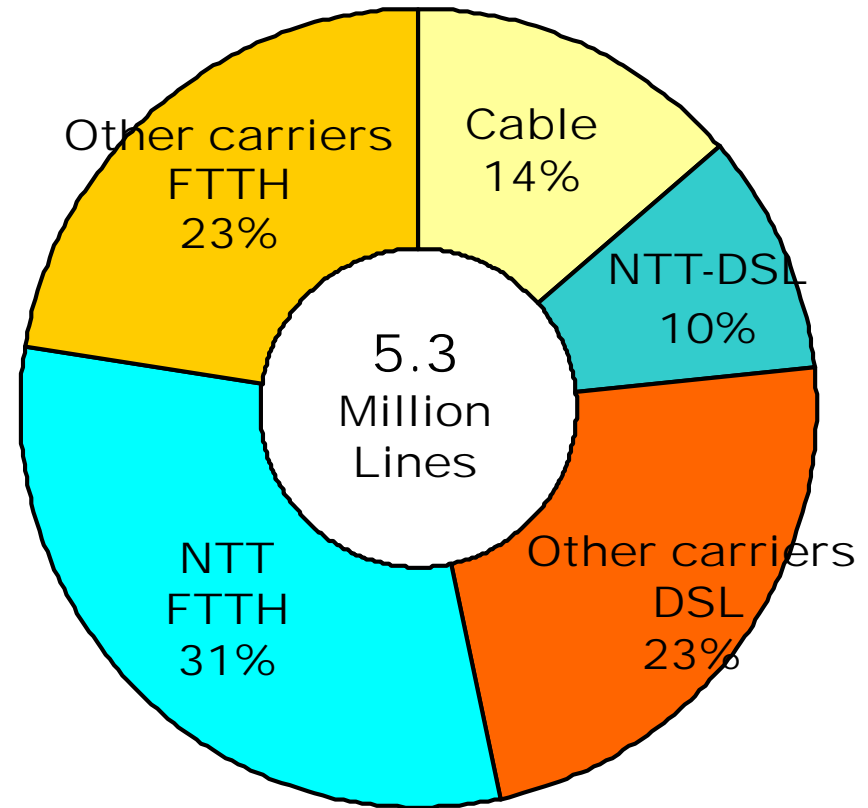
Source: MIC

Market Shares of Broadband Services in Japan

Tokyo metropolitan area



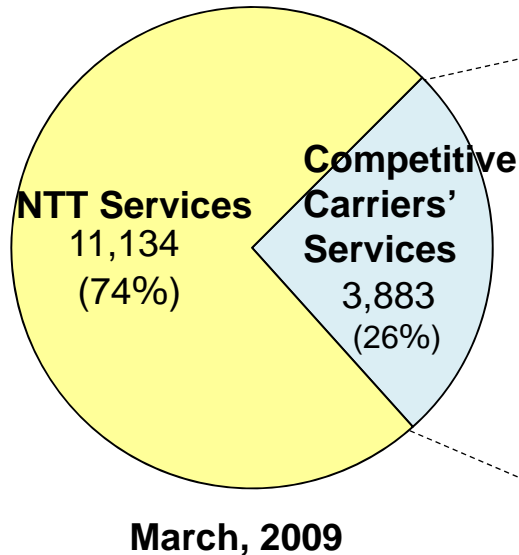
Kinki region (Osaka, Kyoto...)



Source: MIC and NTT survey (Dec.31,2008)

Competition status of FTTH services in Japan

The Number of FTTH Services



Thousand subscribers
(share %)

Power utility group carriers	: 1,664 (11.1%)
USEN	: 510 (3.4%)
Others	: 884 (5.9%)
KDDI	: 825 (5.5%)

Providing services using their own fiber.

Providing most of services using their own fiber.

"Others" consist mostly of Cable companies, providing services using their own fiber.

In metropolitan and chubu region, providing services using their own fiber, acquired from power companies. In other area, using NTT's unbundled fiber.

(Estimation)

Facilities for Competitive Carriers' Services

Providing services Using their own fiber

Providing services using NTT's unbundled fiber

MIC : Disclosure of Quarterly Data concerning Competition Review
in the Telecommunications Business Field
Fourth Quarter of FY2008 (as of the end of March 2009)
Ref. Jun.25,2009 MIC press release P.9

Broadband Coverage in Japan

Goal

(Digital Divide Elimination Strategy,
MIC 2008)

Sep. 2008

Broadband

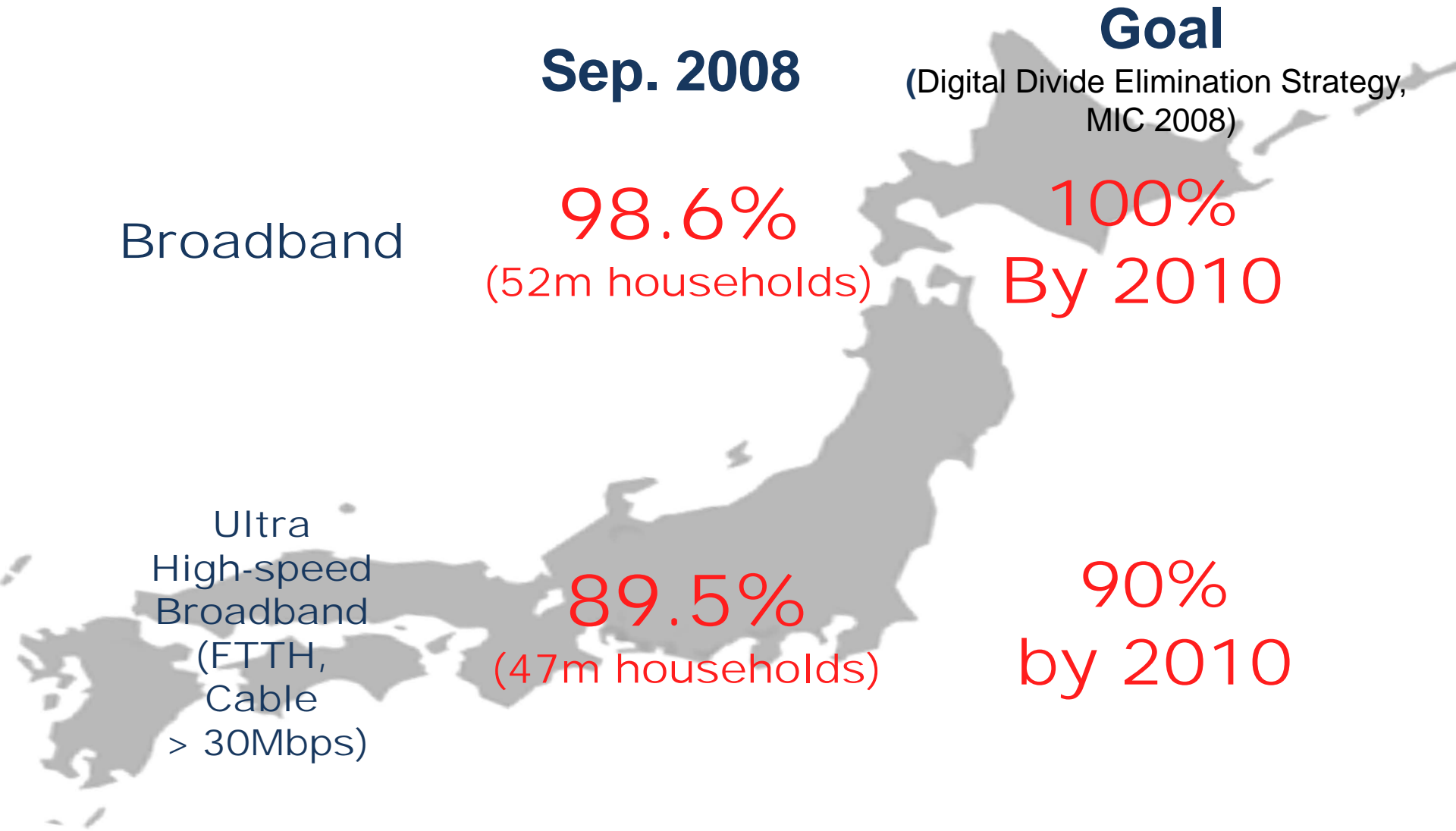
98.6%
(52m households)

100%
By 2010

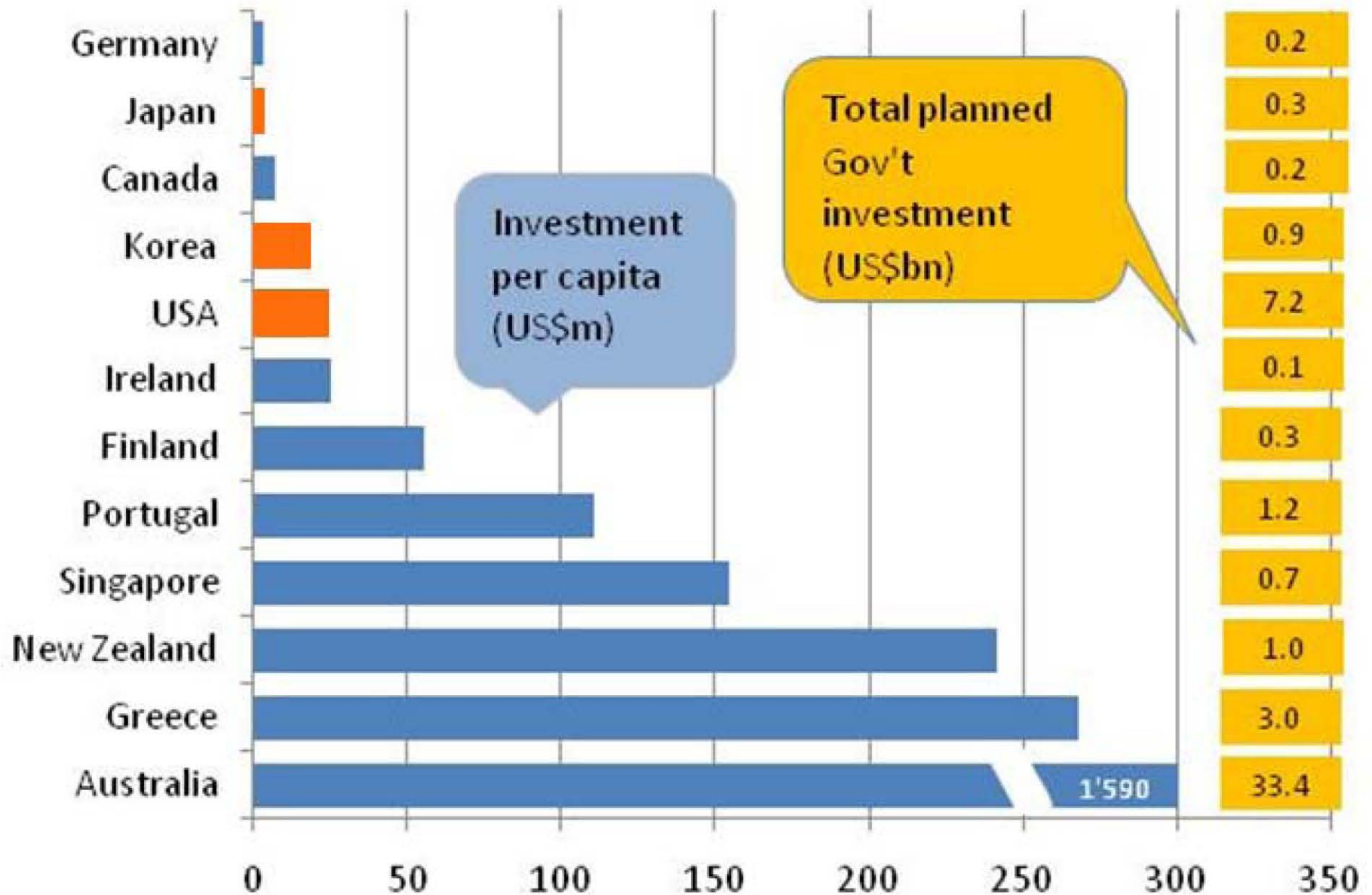
Ultra
High-speed
Broadband
(FTTH,
Cable
> 30Mbps)

89.5%
(47m households)

90%
by 2010

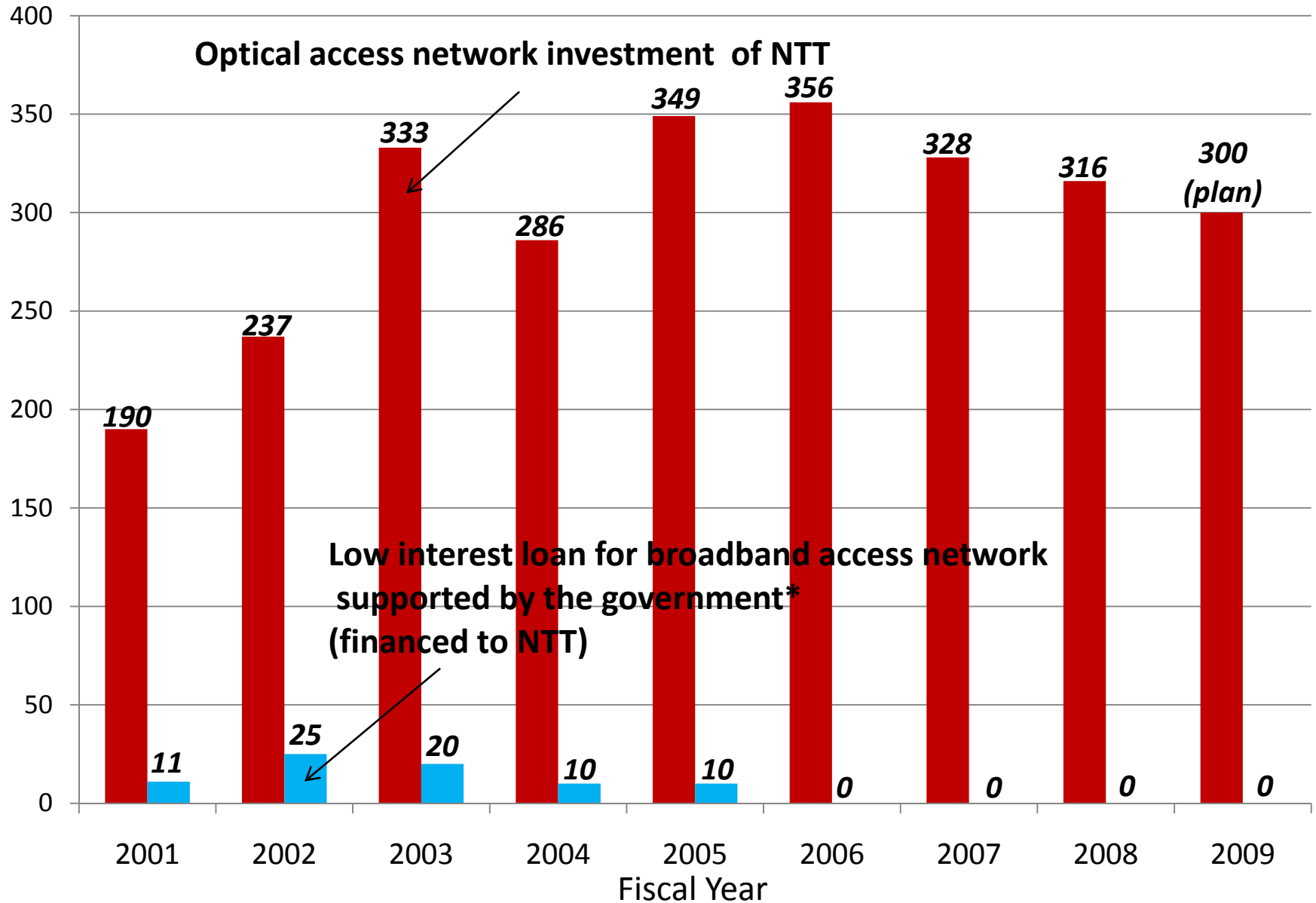


Broadband in national stimulus



Capital Investment of NTT and Low Interest Loan supported by the Government

(Billion JPY)

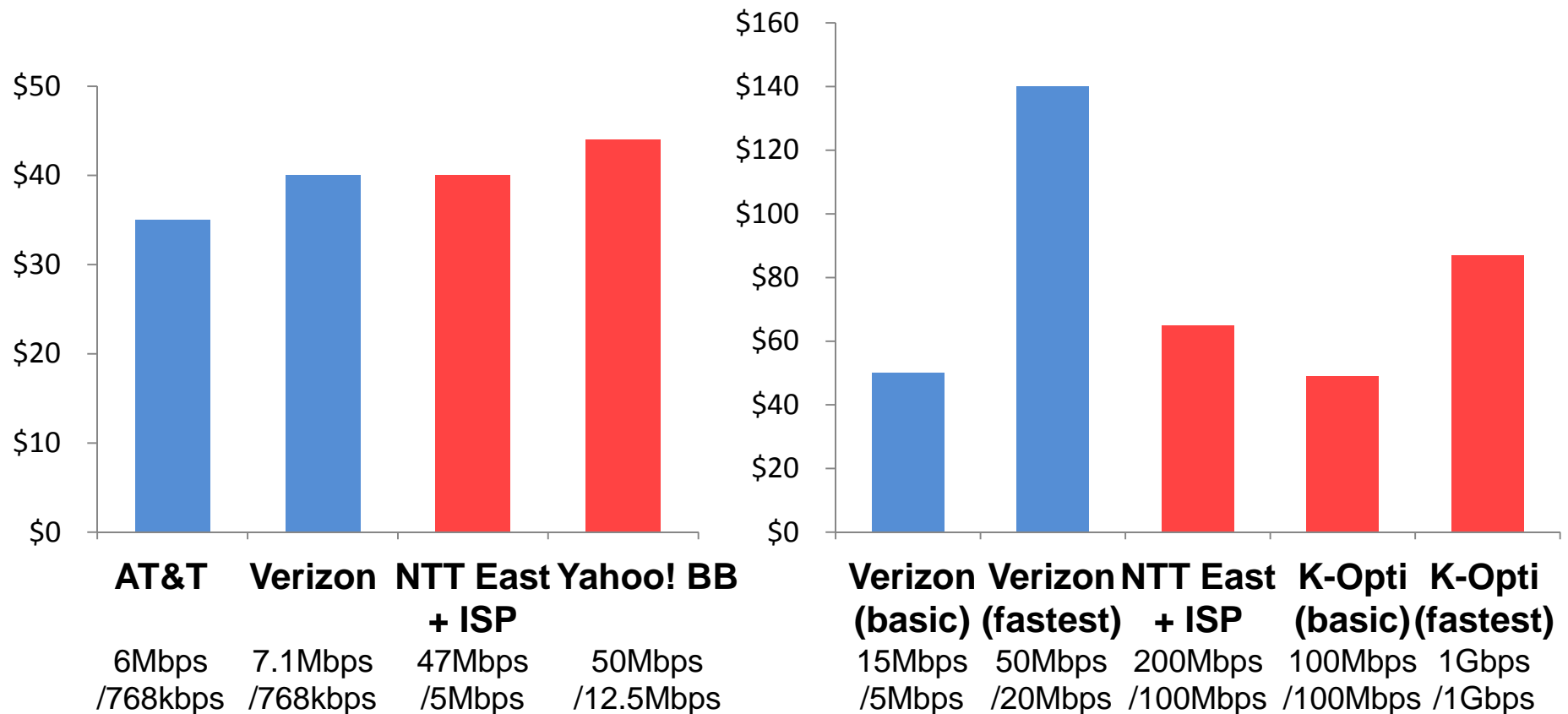


* The loan is financed from Development Bank of Japan

Broadband Price

DSL

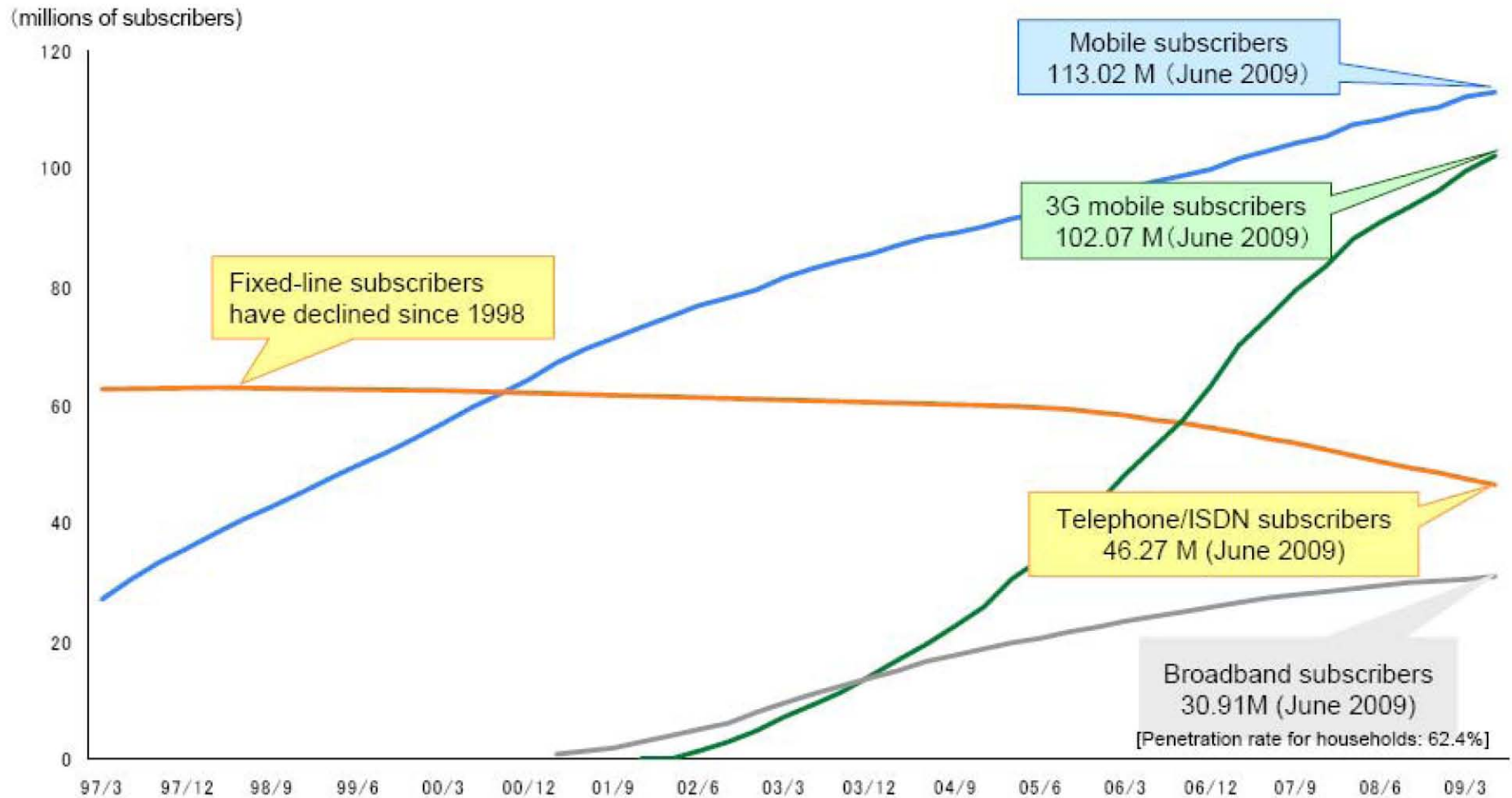
FTTH



Source: Official websites

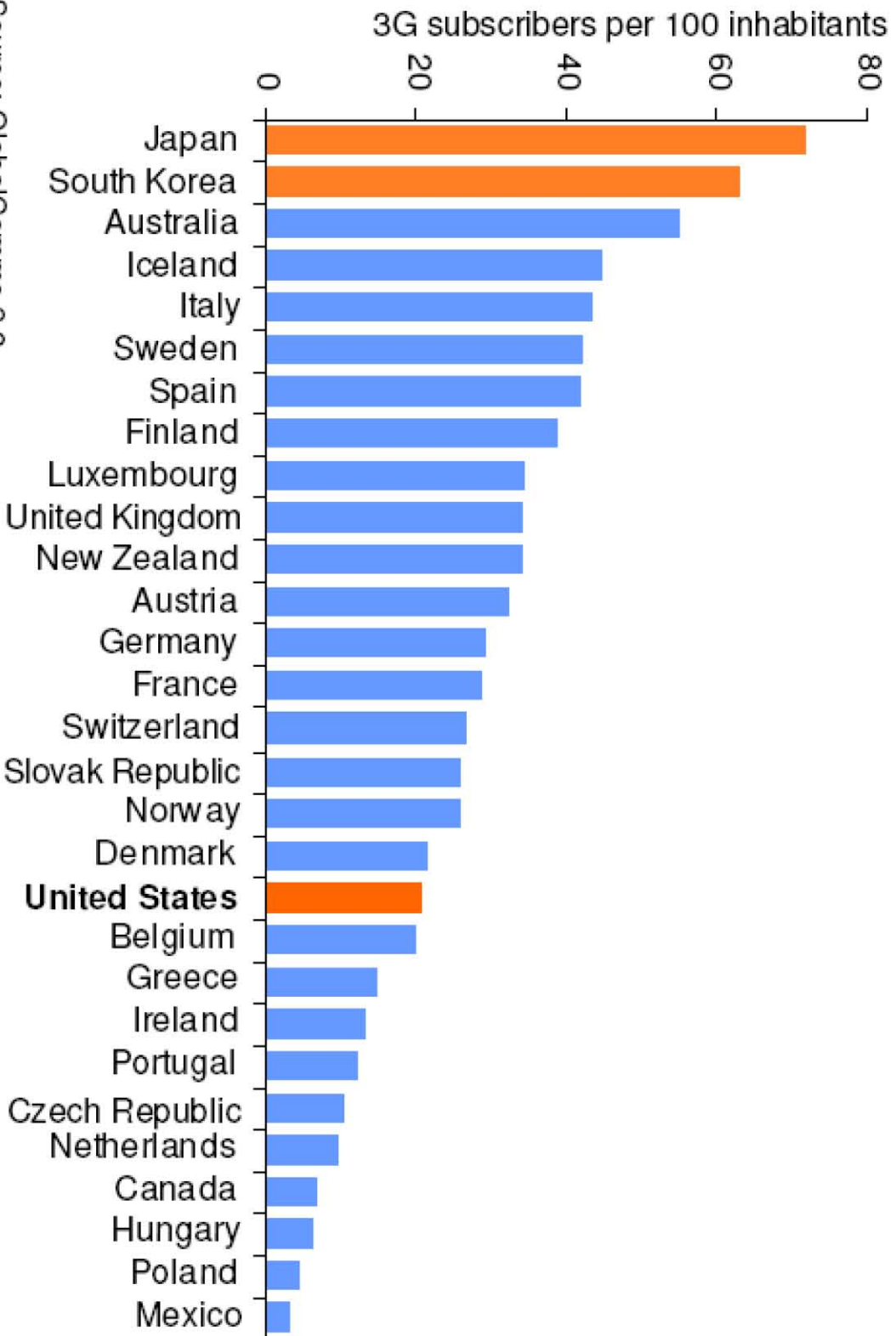
Exchange rate: 1 USD = 100 JPY

Telecom Service Subscriptions in Japan



3G Penetration

Source: GlobalComms 3.0



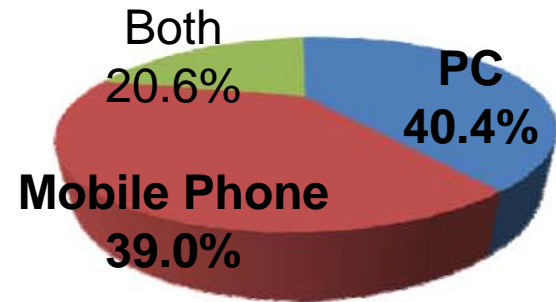
Data Revenue Percentage in Wireless Segment

26%	25%	45%	38%
AT&T	Verizon	NTT DoCoMo	KDDI
?	?	100% (7.2Mbps or 3.6Mbps)	99.9% (3.1Mbps)

3G Area Coverage (population base)

Source: official websites (IR, PR)

Which is your main terminal for E-mail? (Japan)



Source: goo n=1038



Internet



SNS/Blog...



Shopping
(charged on
cell phone bill)

Video



Broadcast TV
“One-Seg”



Packet TV
ex. BeeTV

E-Wallet



Retail shop



Train ticket